

Caucus Systems, Inc. Site Visit by CoP SIG
June 7, 2000

About Caucus Systems, Inc (from Caucus materials)

Caucus Systems, Inc. is a leading provider of virtual collaborative environments for global 1000 companies. Caucus= unique technology platform derives from its exclusive expertise in structuring virtual teams and business conversations to maximize performance and outcomes. Caucus products allow team members to structure conversations and collaborate virtually at any time or place. The company specializes in transforming critical business processes and activities into effective virtual experiences where knowledge is created, exchanged, and transferred. Caucus delivers to clients the new paradigm for doing business in the global economy, through collaborative environments that are scalable, flexible, secure and readily incorporate enterprise applications.

Caucus Systems, Inc.
2000 North 15th Street, 2nd Floor
Arlington, VA 22201
703-465-8335
www.caucus.com

Primary Contacts: Lisa Kimball
 John Stokes

Purpose of Visit

The CoP SIG visited this organization because of their expertise in creating, nurturing and sustaining CoPs.

Insights, Critical Success Factors, Lessons Learned

The primary business process for making things happen (production) is conversation, i.e., personal exchanges. Organizations should take actions to support and enhance this key activity.

Conversations in a virtual environment (i.e., a technology enhanced CoP) can dramatically cut down on the flood of e-mails. Virtual environments can use a pull vs. push philosophy, i.e., one gets pulled in to the space where the conversations occur/information is located vs. pushing conversations to a multitude of e-mail boxes.

Those that might not speak openly at a face-to-face meeting often feels comfortable contributing by writings, hence making knowledge available that may not be freely provided otherwise.

Make the virtual space as familiar as possible using terms and places known by the organization's culture. For example, your organization may recognize the informal meeting space as The Water Cooler, others may know it as The Hallway, or The Lunchroom.

Relationships bind but a common interest(s) is necessary but often by itself is not the glue that binds. Social hooks are needed for a stronger bond. Establishing the relationships of the group before working in the virtual space helps draw people in because they know each other. Other techniques to create these bonds follow:

- C Help create/strengthen ties with storytelling or an icebreaker so people get to know each other on-line.
- C Consider a **A**time container@**B** Ask each person (especially those reluctant) to participate for a certain time and in a certain role so they know how to act and that their commitment isn't **A**forever.@ If relationships develop, persons may volunteer to extend their **A**time container.@
- C Ask a group to perform a specific task (e.g., plan a meeting, produce a resource directory) as a focused purpose that creates the need to have virtual conversations, possibly creating lasting relationship and ties.
- C Help the group perform by providing assistance, e.g., an on-line facilitator to capture ideas and group thinking, and document/present it with context for the group. This can assist with administrative burdens and reduce time demands. This may give the group a service to which they would normally not have access.
- C Rewards -- if you put in the effort, you'll get a reward (e.g., a meeting with the Executive Director or other top level staff, an invitation to a highly thought of conference/meeting/work group).

Virtual meetings don't replace **A**face-to-face@on critical issues. Because a virtual space provides additional options for getting work done, one now has choices and can optimize what a group does with its limited face-to-face time for greatest effectiveness.

You cannot do too much to orient/prepare people in advance of their virtual community experience. The desire is for people to internalize their connection to the CoP and those individuals in it, i.e., have a vision for what working in the specific virtual CoP space will be like.

ALess is more@in engaging interactions is difficult to communicate to sponsors; initial reaction is to dump in everything. Providing too much **A**stuff@creates personal discomfort in trying to **A**do it all,@read it all, and participate in every area and in every way. Participants become overwhelmed and overload occurs. The goal is to engage conversation and exchange (which there is not time for if there is too much content). Interaction and building relationships suffer or never happen.

People are put off by knowing something exists but not having access (i.e., only certain parts open to certain people). Makes people feel excluded vs. included. Focus on openness.

The first interaction/contribution in a community is by far the hardest to obtain; each successive contribution is easier to obtain, but still possibly difficult. Therefore, control your starting position in a CoP by having some **A**ringers@or known good behavior models to seed and facilitate the group start-up. Make sure the group is not too small or too large. Two is only a dialogue and is too small; three is minimum but don't try too many. Pre-load discussion areas with appropriate roundtable dialogue. Examples:

- C Set up 3 +/- issues and get 3 to 5 people to respond. Pre-load this before making it public.
- C Start conversations synchronously (meeting/phone) to get dialogue started. Identify key issues from this first meeting and ask specific people to document, monitor, facilitate its continuation in

the virtual space.

- C Give each person a specific role at the beginning so they have something specific to do, like provide your perspective from headquarters, another from a field office.
- C Monitor ongoing interactions, then identify several top themes providing focus for participants.

The up front planning and design of the virtual meeting and dynamics is key and of great importance for success. Think it through totally. What will have to be done before, at the virtual space, and after in order to achieve the desired result? What is the person-centered **Agrease@** that will cause individuals to participate and make the event work?

The smallest piece is the technology; however, it cannot be done without the technology. The technology component can make the experience easier or harder **B** be sensitive to this. For example, technology can simulate formal, one-to-many presentations, or a small, roundtable conversation. Which supports open contributions by all? Which is best for your event?

Positive insight for KM: The developing direction in KM seems to be guided by the human/social side vs. technology. This is good because knowledge exchange is founded on relationships.